Department of Technology Services

Remedy Web Console

Updated September 2006

Remedy Web Console

These instructions should assist you when logging onto the Remedy Web Console. If you have any problems, please contact the DTS Service Desk at (916) 464-4311 (CALNET 433-4311) or send an email to: DTSHELP@DTS.CA.GOV

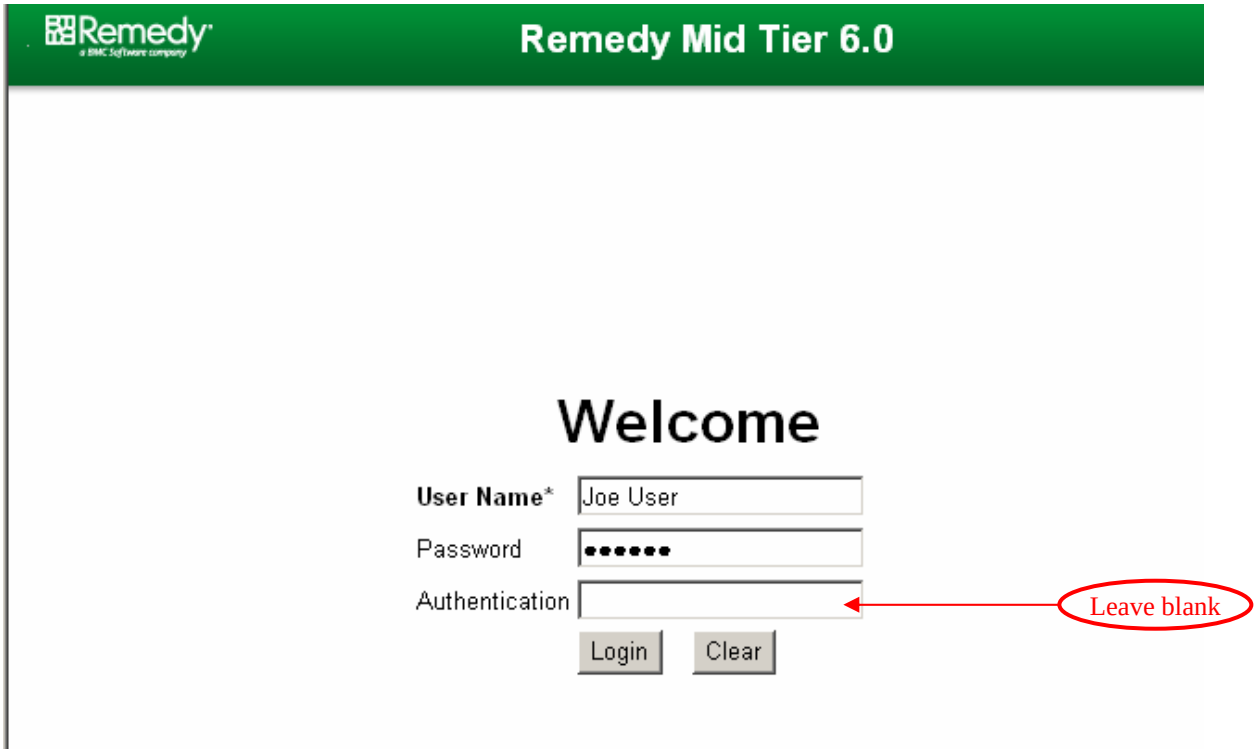
Customers must subscribe to the Remedy Web service in order to create and to view Service Desk Requests, and to view Change Requests. To request Remedy Web access, please contact the DTS Service Desk. Please allow approximately three business days for the processing of your access request.

Login Procedure

You can access the Remedy Web Console at: HTTP://SDP.DTS.CA.GOV

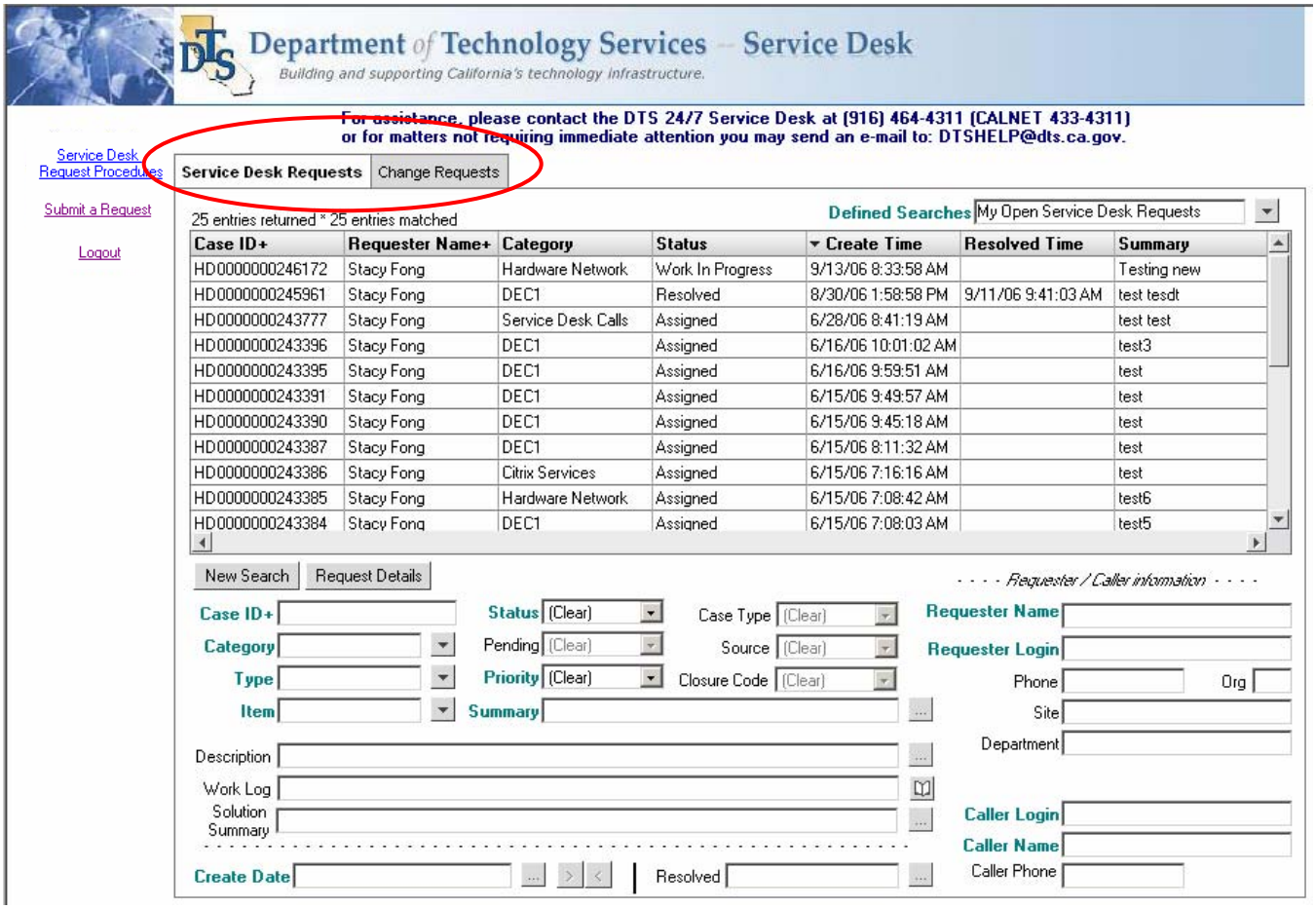
To log into this system, enter your **User Name*** and **Password** (Case sensitive) and click on **Login**.

* The first letter of each name must be capitalized, e.g., Joe User.



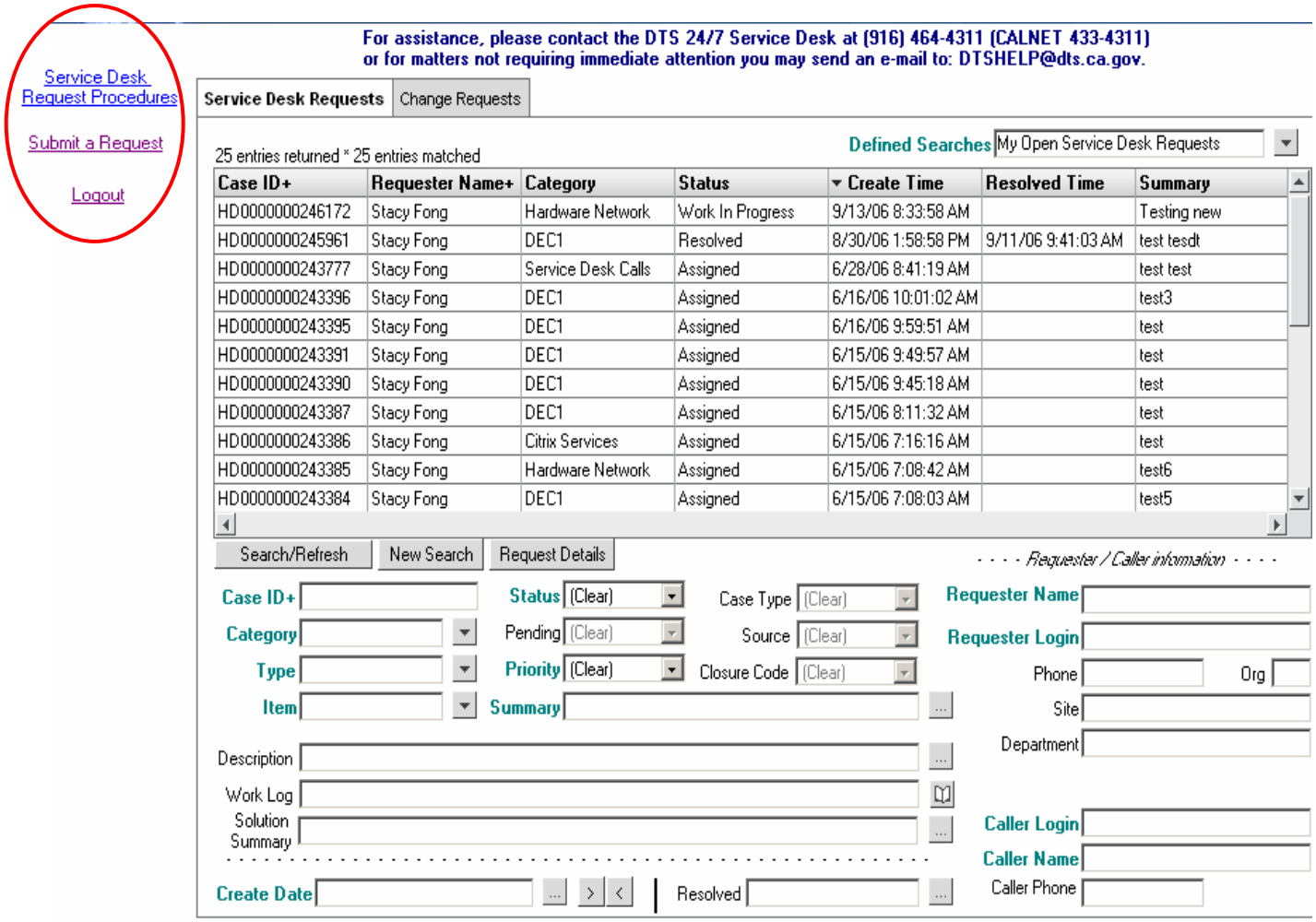
SERVICE DESK AND CHANGE REQUESTS

- After logging in, the following window will appear. You will have the option to either view a Service Desk Request or a Change Request by clicking on one of the tabs located at the top of the form.
  - **Service Desk Requests** – you will be able to submit and view requests for your agency. This is Read-Only access and will not be able to update or modify a request. If you need to update a request, please contact the DTS Service Desk.
  - **Change Requests** – this will display all Change Requests for the Data Center and will have Read-Only access. You will not be able to submit or modify a Change Request.



SERVICE DESK REQUESTS

- On the left side of the form, you will have three selections to choose from.
  - Service Desk Request Procedures
  - Submit a Request
  - Logout



SUBMITTING A SERVICE DESK REQUEST

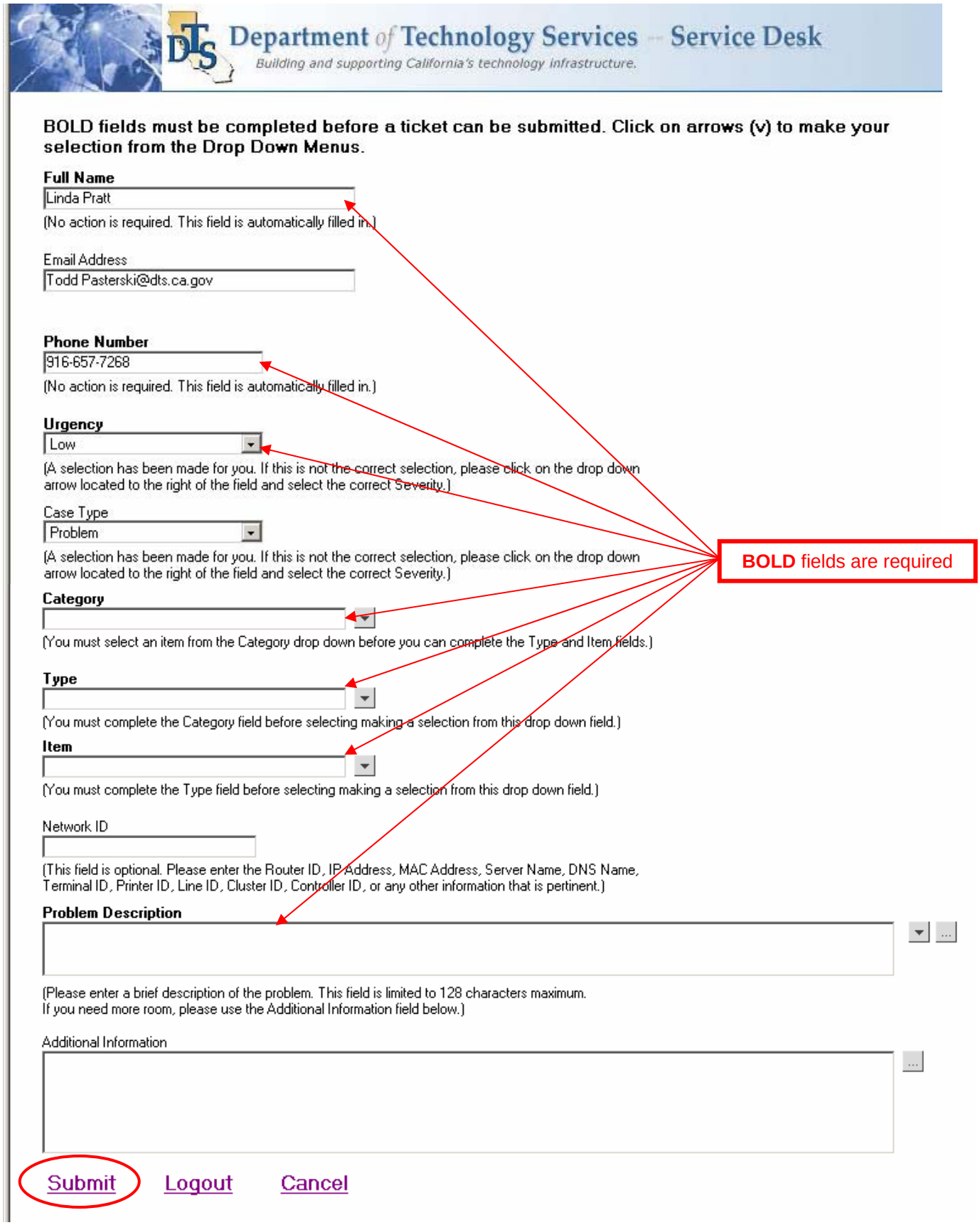
OVERVIEW

- A Service Desk Request is used to request assistance or to report an incident regarding services provided by the Department of Technology Services. After entering the required information and clicking on the **Submit** button, a request is created in the Remedy System and an email message is sent to: DTSHELP@DTS.CA.GOV notifying the DTS Service Desk of a request submission.

SUBMITTING A NEW REQUEST

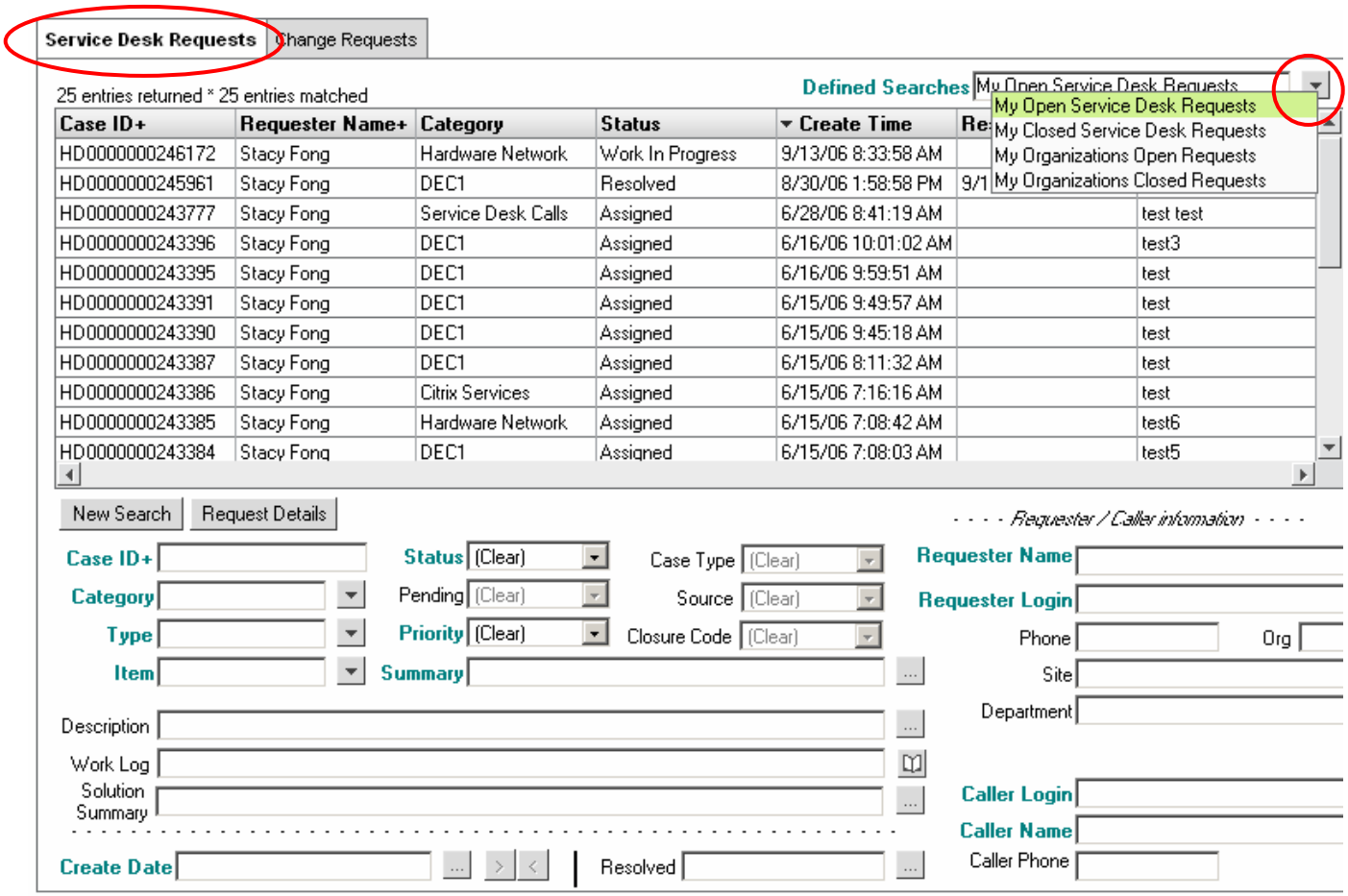
- Select **Submit a Request**
- A form will be displayed. Several default values will be automatically entered for you. If these are incorrect you can type in the correct information.
- Each field contains a label that identifies whether it is a required or optional field. All required fields are **BOLD** and must be completed before a request can be submitted.
- Information can be entered in most fields by typing directly in the box provided; however, some fields provide a drop-down button for your convenience. A selection must be made from the drop-down menus in the Category, Type, and Item fields. You cannot type an entry into these three fields. Choose a selection that best describes your problem.
- Click the **Submit** button to submit the request. You will receive a Submit Successful statement, the entry identification number assigned to the new request and a message that the DTS Service Desk has been notified. You will also receive a notification via email.

SUBMITTING A NEW REQUEST (CONTINUED)

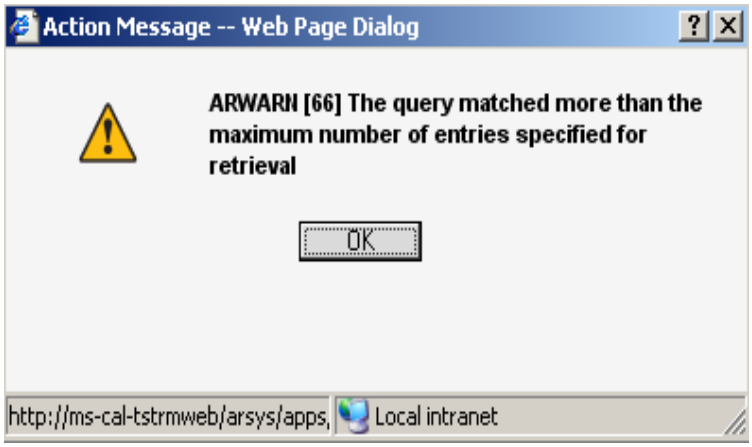


VIEWING YOUR SERVICE DESK REQUESTS

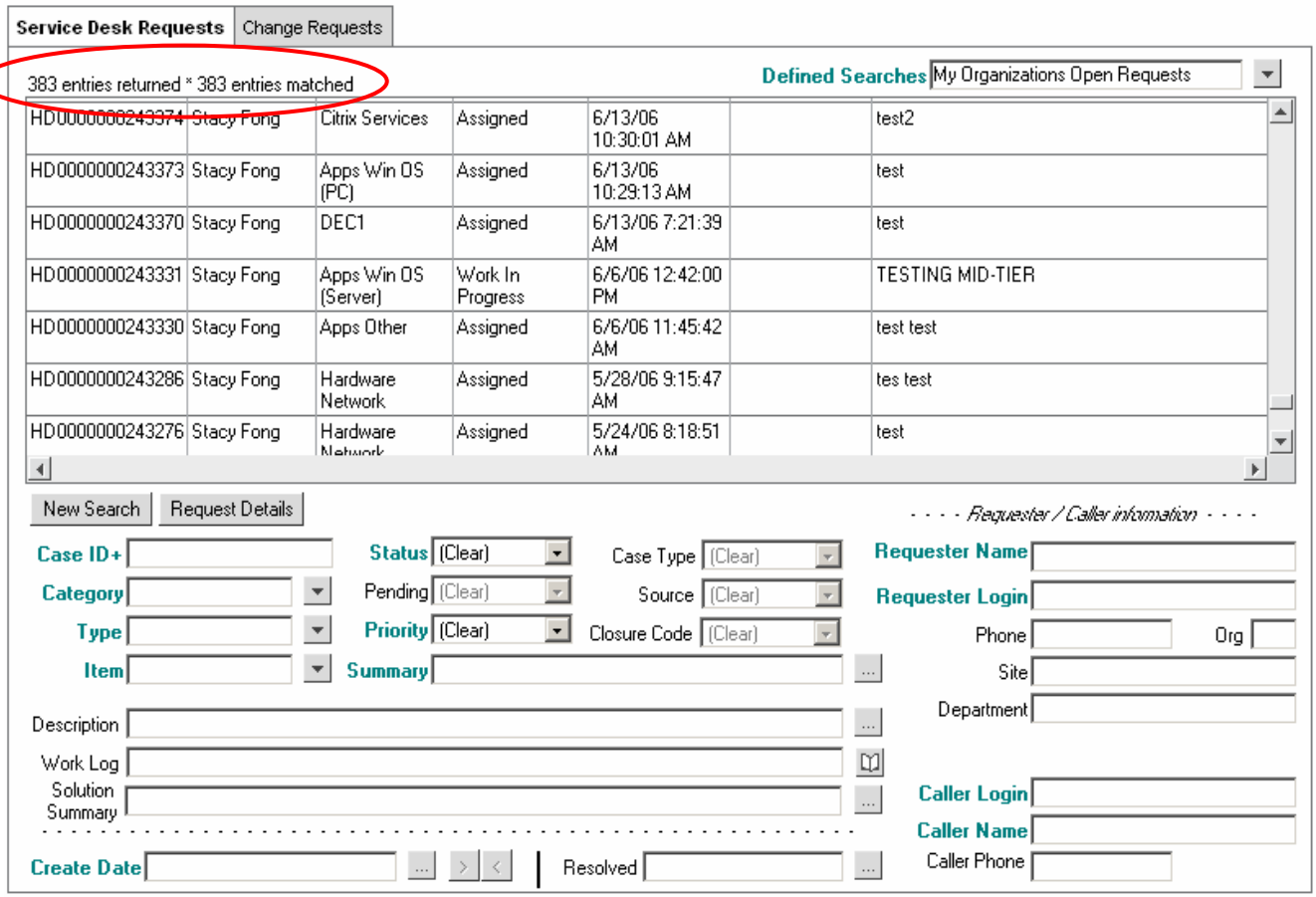
- Select the **Service Desk Requests** tab (the tab should be white when selected.)
- Click on the **Defined Searches** dropdown at the right of the form. You will have four selections to choose from.
  - My Open Service Desk Requests
  - My Closed Service Desk Requests
  - My Organizations Open Requests
  - My Organizations Closed Requests



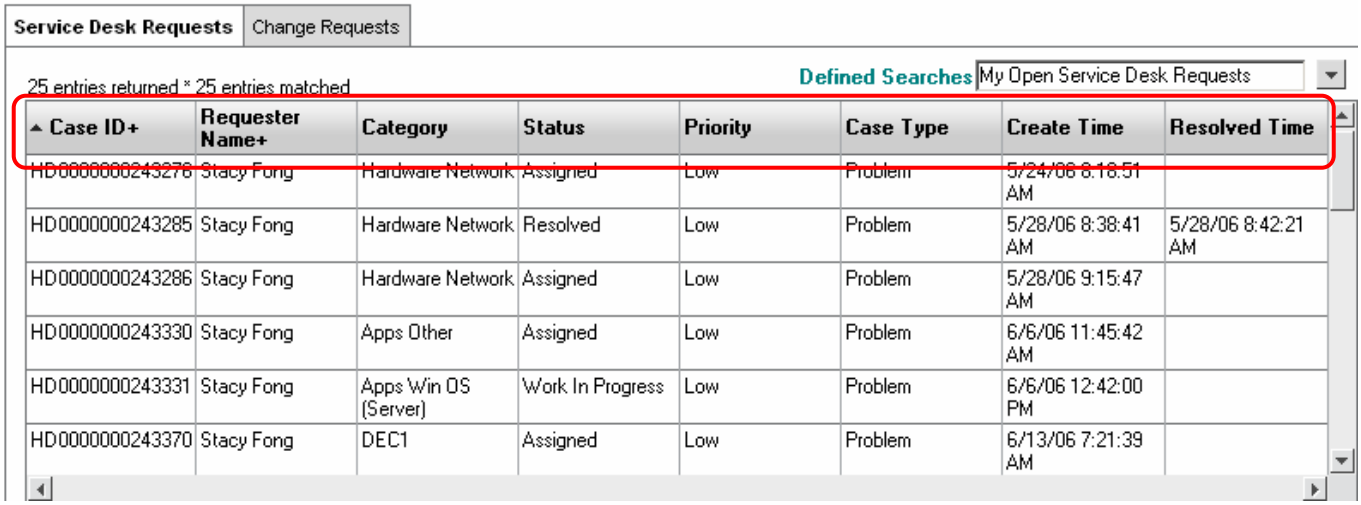
- After a selection is made from the dropdown, the Results Pane will display a list of requests to select from. We have set a threshold on the search to return only 500 entries. If the search exceeds this count, you will receive an error message. Click okay to proceed.



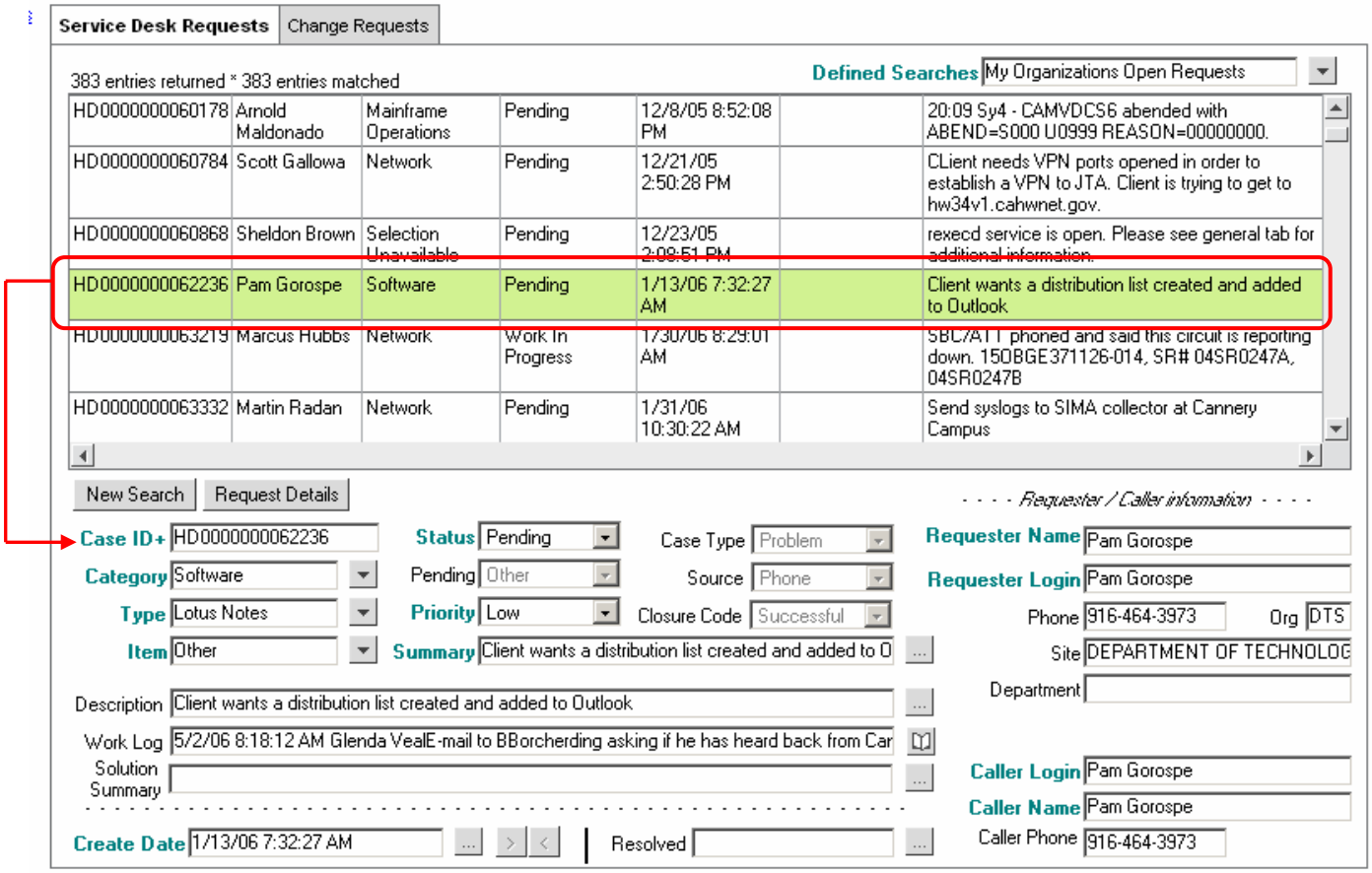
- The top left corner will show how many requests were found during the search.



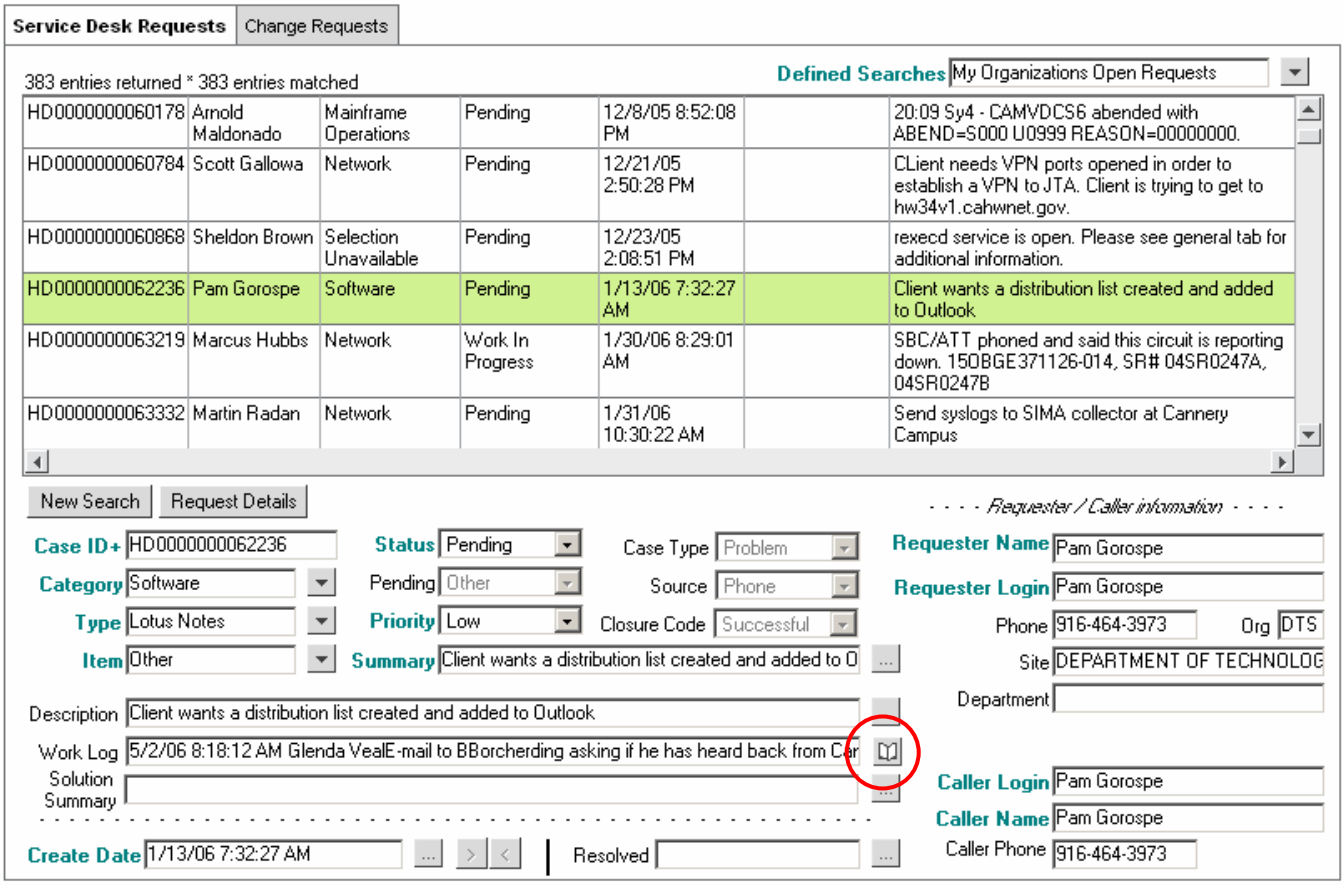
- You can sort any column by clicking on one of the headers in the title bar. Clicking on the header again will reverse the order.

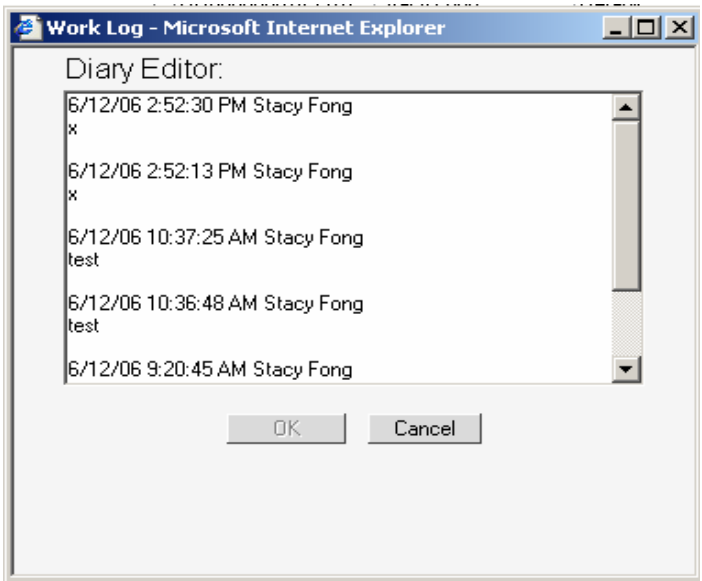


- To view a request, click on one of the requests in the results pane and it will populate the fields located on the lower portion of the form.



- You can view entries in the worklog by clicking on the Diary field. This will open a Diary Editor window for you to view. All entries in this view are time stamped and system protected, they can not be changed or modified.





FIELD DESCRIPTIONS

Field Name	Description (All fields that are **BOLD** are searchable.)
Case ID+	This field is searchable and system generated when the request created and saved.
Category	This field is searchable and populated from a menu dropdown to best categorize the problem.
Type	This field is searchable and populated from a menu dropdown to best describe the type of problem.
Item	This field is searchable and populated from a menu dropdown to itemize the type of problem.
Status	This field is searchable and Status codes are assigned to track the status of requests. As a request goes from one stage of processing to another, the codes are updated to indicate the current status of the request. Selections are: New, Assigned, Work in Progress, Pending, Resolved, and Closed.
Pending	This field is used to show the reason a request is in Pending status. Selections are: Approval, Caller Information, External Agency Action, Monitoring, Parts, Release, Requester Information, Review, Testing, Vendor Action, Change Requests, and Other.
Priority	This field is searchable and used to show how critical a problem is. Selections are: Low, Medium, High, and Urgent. See Explanation on the following page.
Case Type	This field is used to show the type of request opened. Selections are: Problem, Question, and Request.
Source	This field is used to show how the request was opened. Selections are: Phone, Requester, Email, Web NMP, and DSO.
Closure Code	This field displays the appropriate Closure Code: Successful, Successful with Problems, Unsuccessful, and Automatically Closed.
Summary	This field is searchable and displays a short description of the problem. The entry is only 128 characters maximum including spaces. Additional information is entered in the Description Field.
Description	The Summary field will automatically be copied into the Description field. From here, additional information can be entered about the problem.
Worklog	The worklog is where entries are made on the status of the request. Entries saved in the worklog are date and time stamped along with the name of the individual making the entry. Entries in the worklog are permanent and cannot be changed or deleted. You can view entries in the worklog by clicking on the Diary.
Solution Summary	This field will have a description of how the problem was resolved.

FIELD DESCRIPTIONS (CONTINUED)

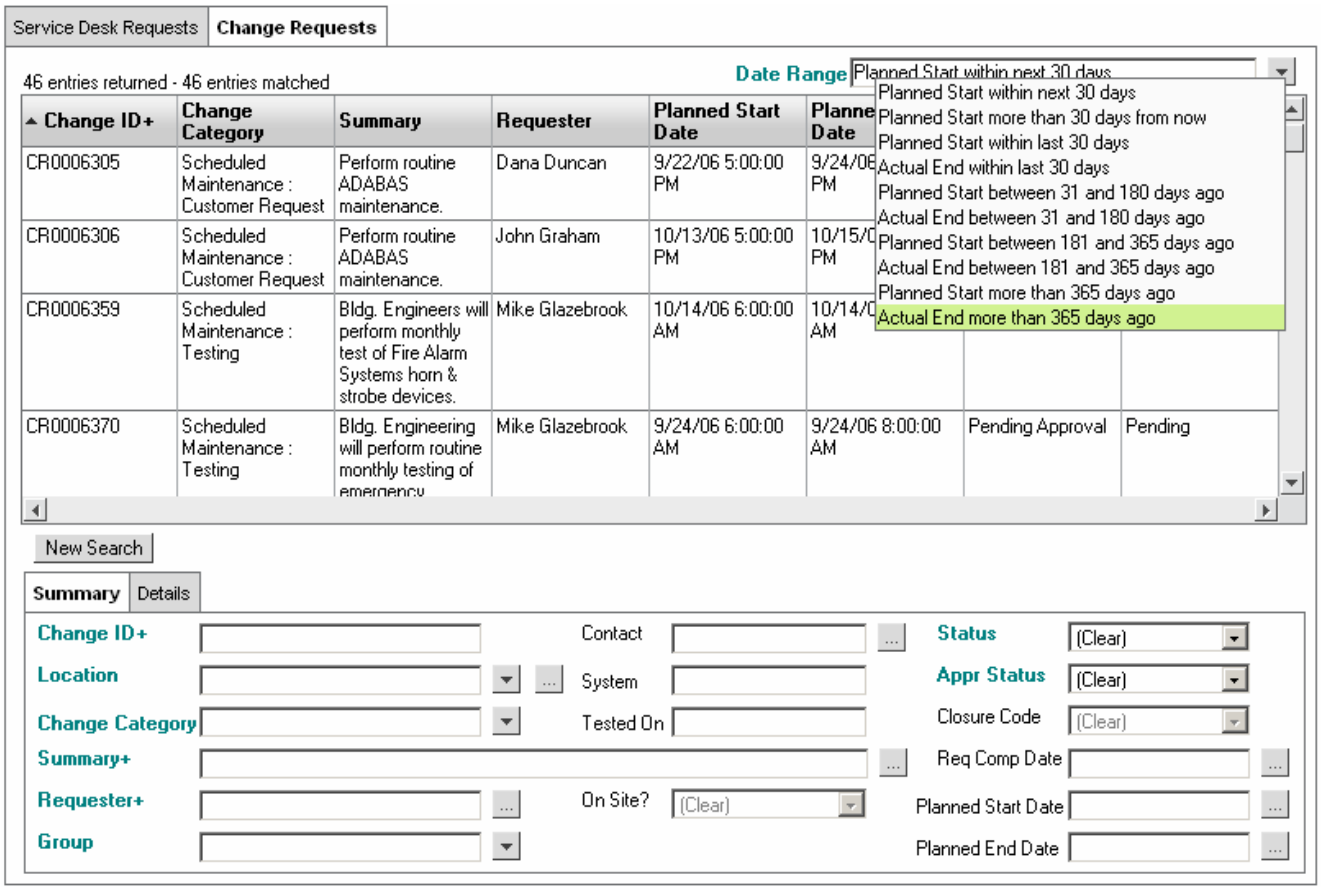
Field Name	Description
Create Date	This field is searchable and displays the date and time the request was created.
Resolved	This field displays the date and time the request was resolved.
Requester Name	This field is searchable and will display the name of the person having the problem.
Requester Login	This field is searchable and will display either the requester's name or login id.
Org	This field displays the Organization Code of the agency calling in.
Site	This field displays the Organization Name of the agency calling in.
Caller Name	This field is searchable and will display the name of the person calling in the problem. This could be the individuals own Help Desk, Co-worker, or the individual himself.
Caller Login	This field is searchable and will display either the caller's name or login id.

PRIORITY

- One purpose is to set the time required for support staff to respond to a request assigned to their group. A request is escalated and an email sent to the support unit manager for each request that does not meet the SLA agreement specified for each priority level.
- The other purpose is to identify problem criticality. The different priorities show up as different colors in the Remedy consoles. This allows support staff to quickly determine which requests to work on first.
  - **Urgent** – Loss of network, equipment or application connectivity affecting multiple sites, VIP requests, and requests that need immediate attention.
  - **High** – Loss of network, equipment or application connectivity affecting a single site, degradation of critical application, requests that need high attention.
  - **Med** – Operations degraded but still functional, non critical equipment outage, DNS requests, customer has work-around.
  - **Low** – Minimal impact to operations, customer scheduled outage, customer needs advice or information, pending parts or Customer reply.

VIEWING CHANGE REQUESTS

- Select the Change Requests Tab (the tab should be white when selected.)
- You will see all Change Requests submitted by the Data Center. You will only be able to view the Change Request and nothing else.
- Click on the **Date Range** dropdown at the right of the form. You will have ten selections to choose from.
  - Planned Start within next 30 days
  - Planned Start more than 30 days from now
  - Planned Start within last 30 days
  - Actual End within last 30 day
  - Planned Start between 31 and 180 days ago
  - Actual End between 31 and 180 days ago
  - Planned Start between 181 and 365 days ago
  - Actual End between 181 and 365 days ago
  - Planned Start more than 365 days ago
  - Actual End more than 365 days ago



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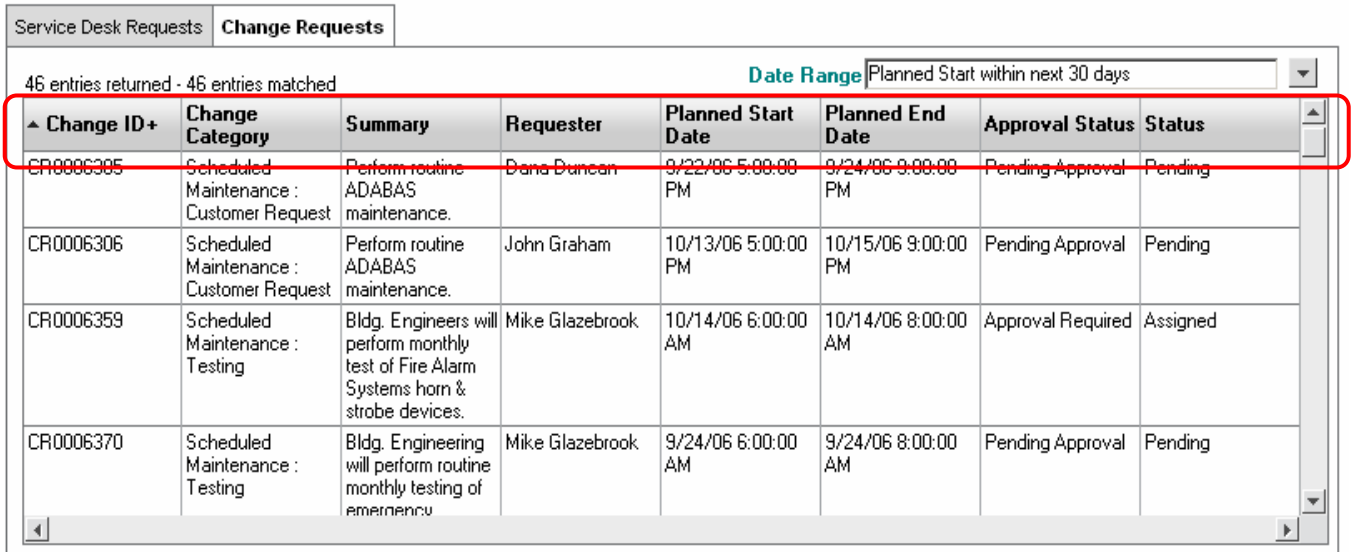

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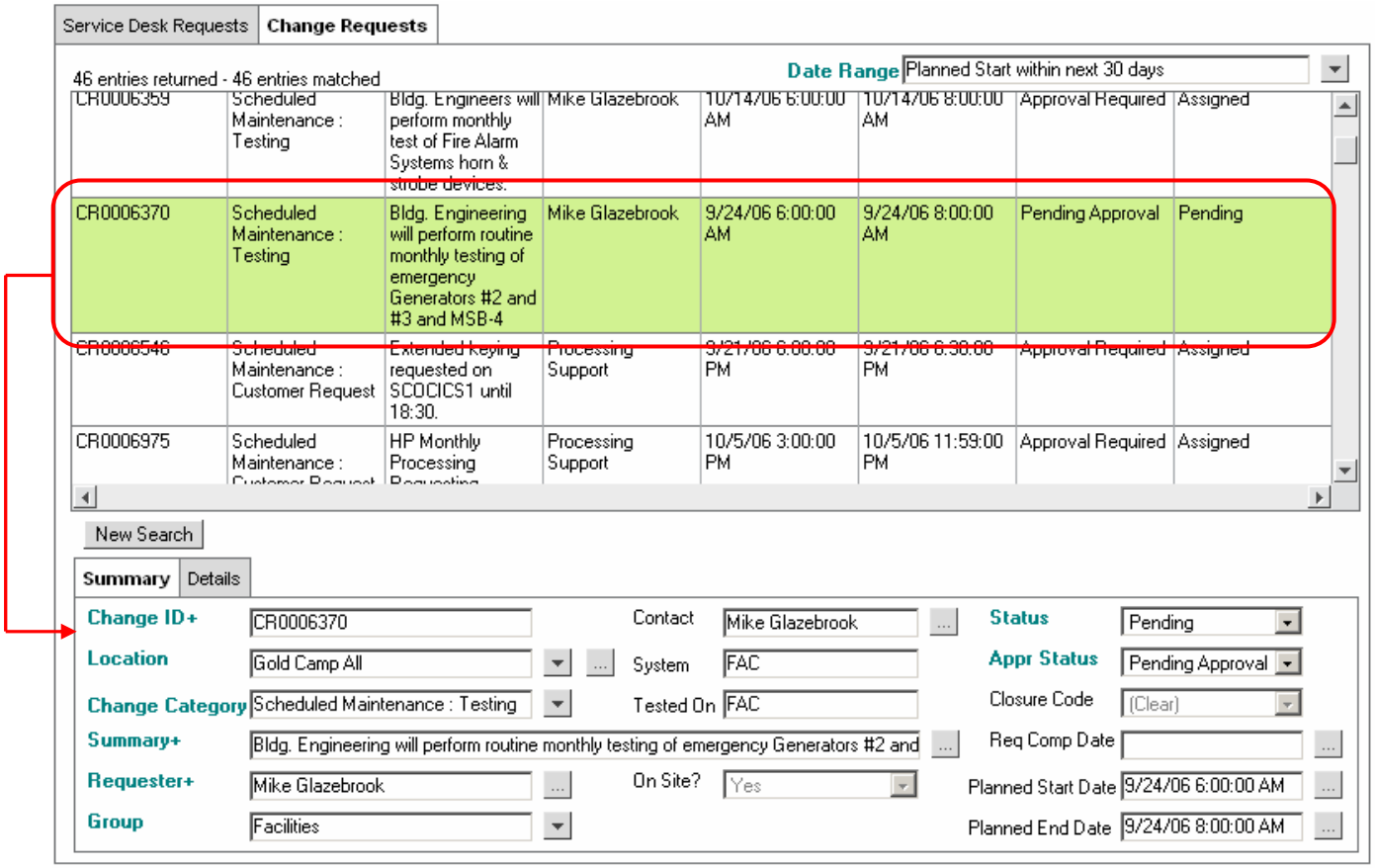
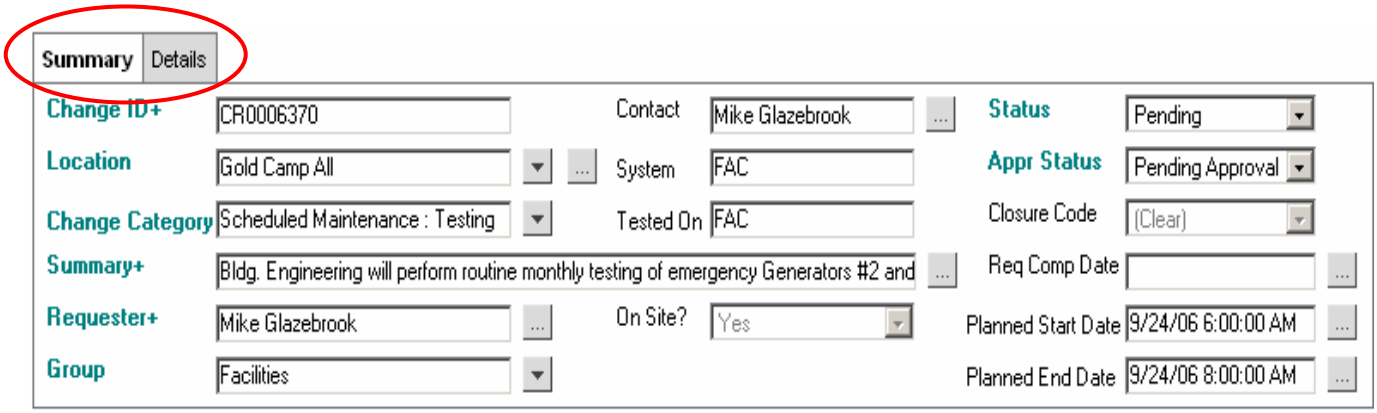
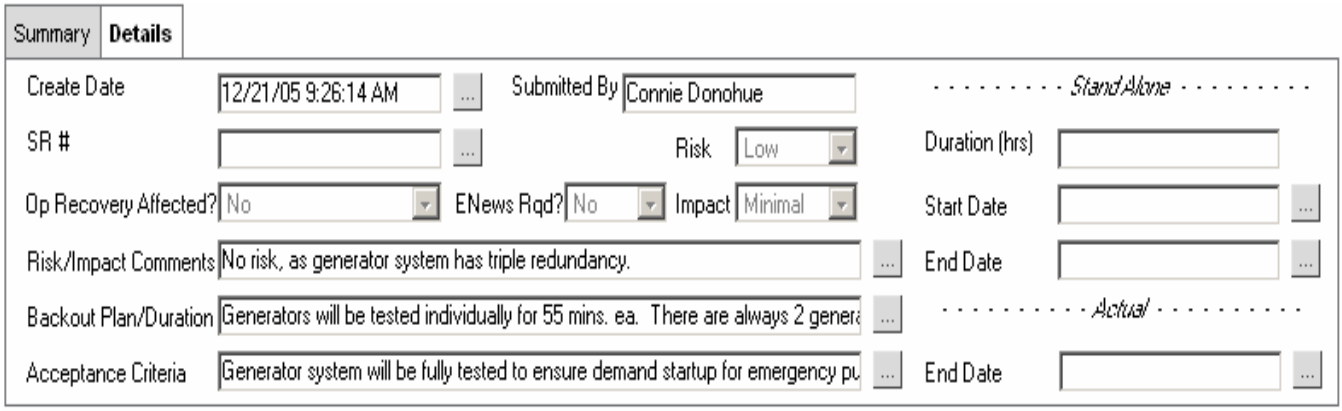


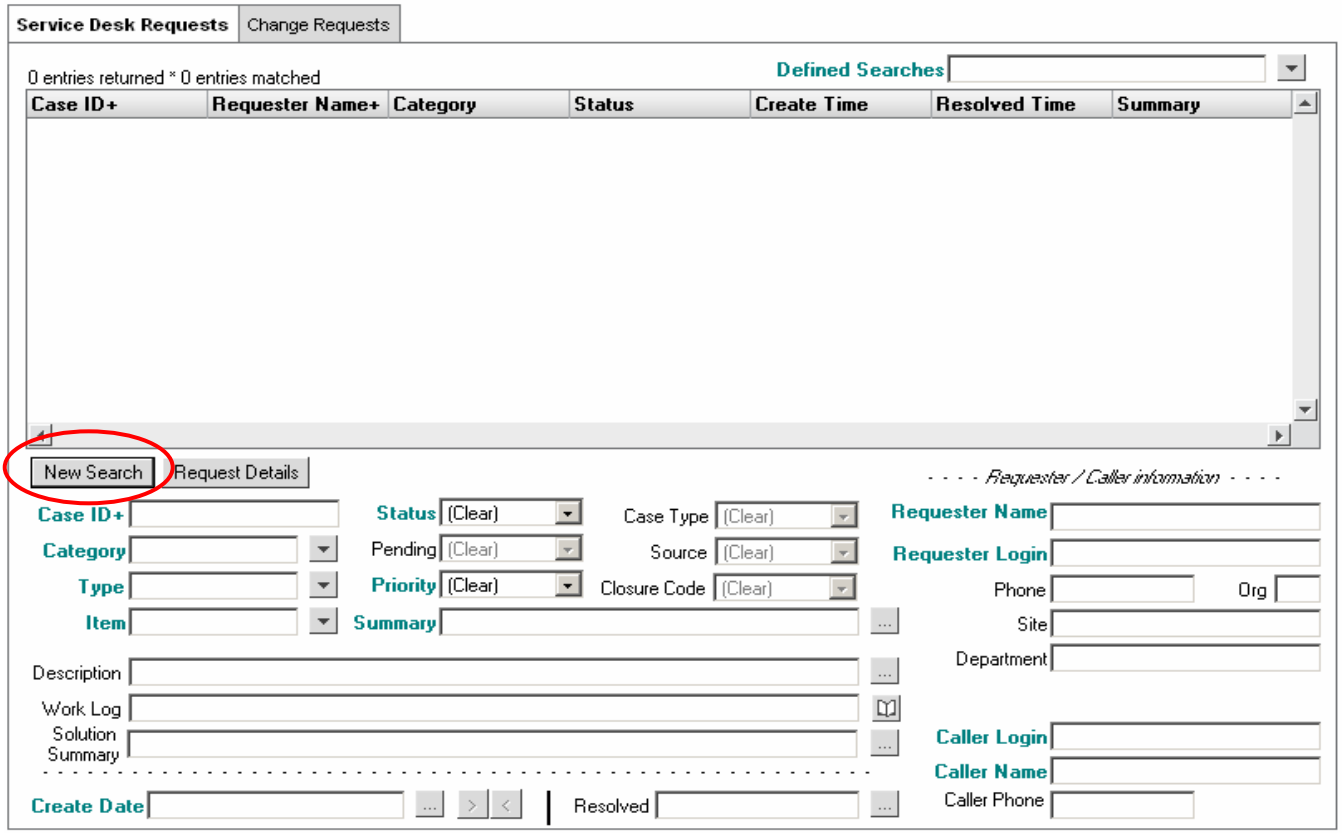
- After selecting a request, there will be two tabs (**Summary** and **Details**) that you can click on to toggle between the views for additional information about the Change Request.





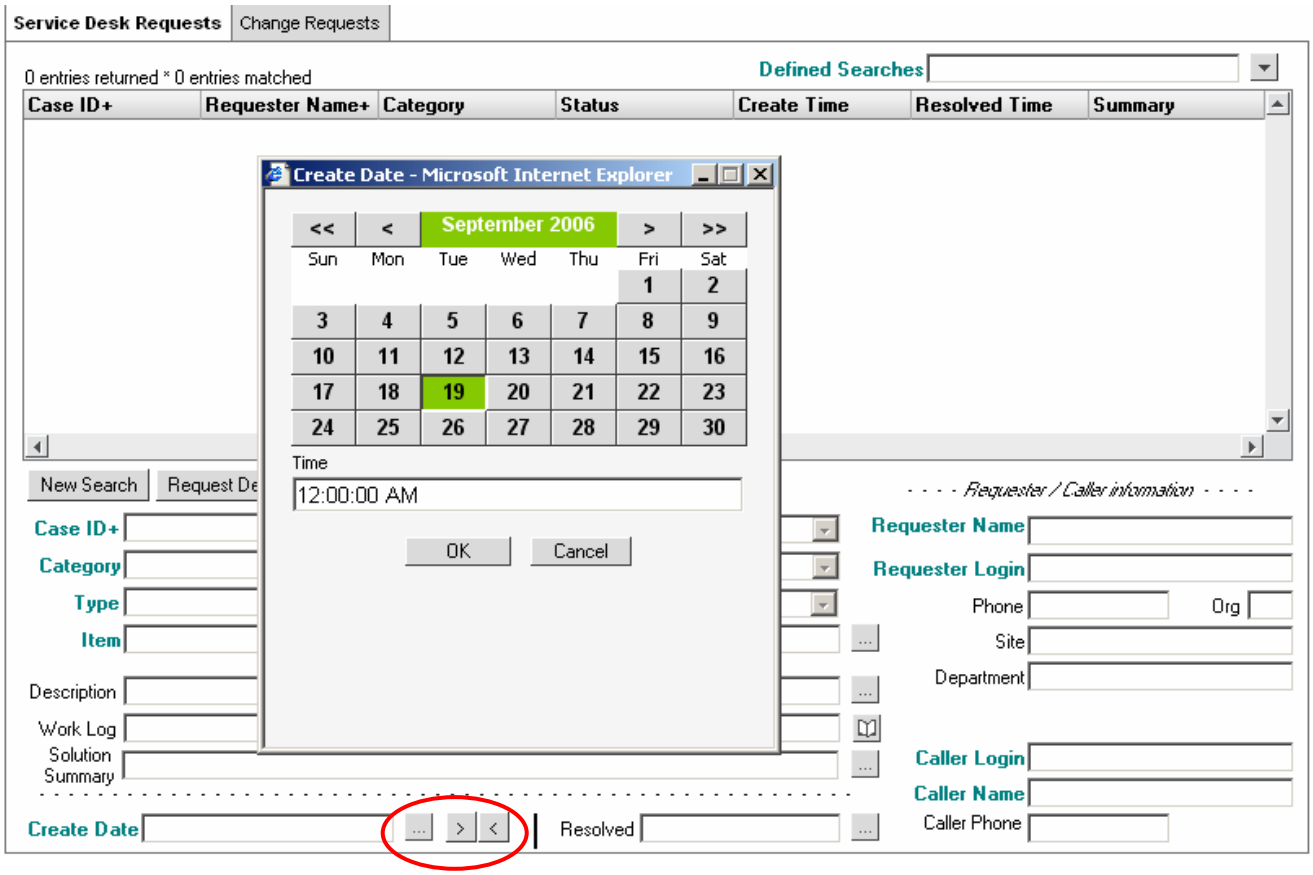
SEARCH OPTIONS – SERVICE DESK REQUESTS AND CHANGE REQUESTS

- This section applies to both Service Desk Requests and Change Requests.
- Click on the New Search button. All fields that are dark green and bold are searchable.
  - Selecting from one of the dropdown fields will automatically perform the search. As you make selections from the other dropdowns, the search will refresh and display requests from the additional search qualifications you have selected. To start a new search, click on the New Search button again.
  - If you perform a search on a field that does not have a dropdown, you will need to hit enter after typing in the word to search for. This search will return all variations of what was entered. Example: if you enter the word "the", it will return all variations (the, there, their, other, etc…)
  - You can also perform a single request search by entering a partial or full request number in the Case ID+ field. This will also bring up all variations of the number entered.



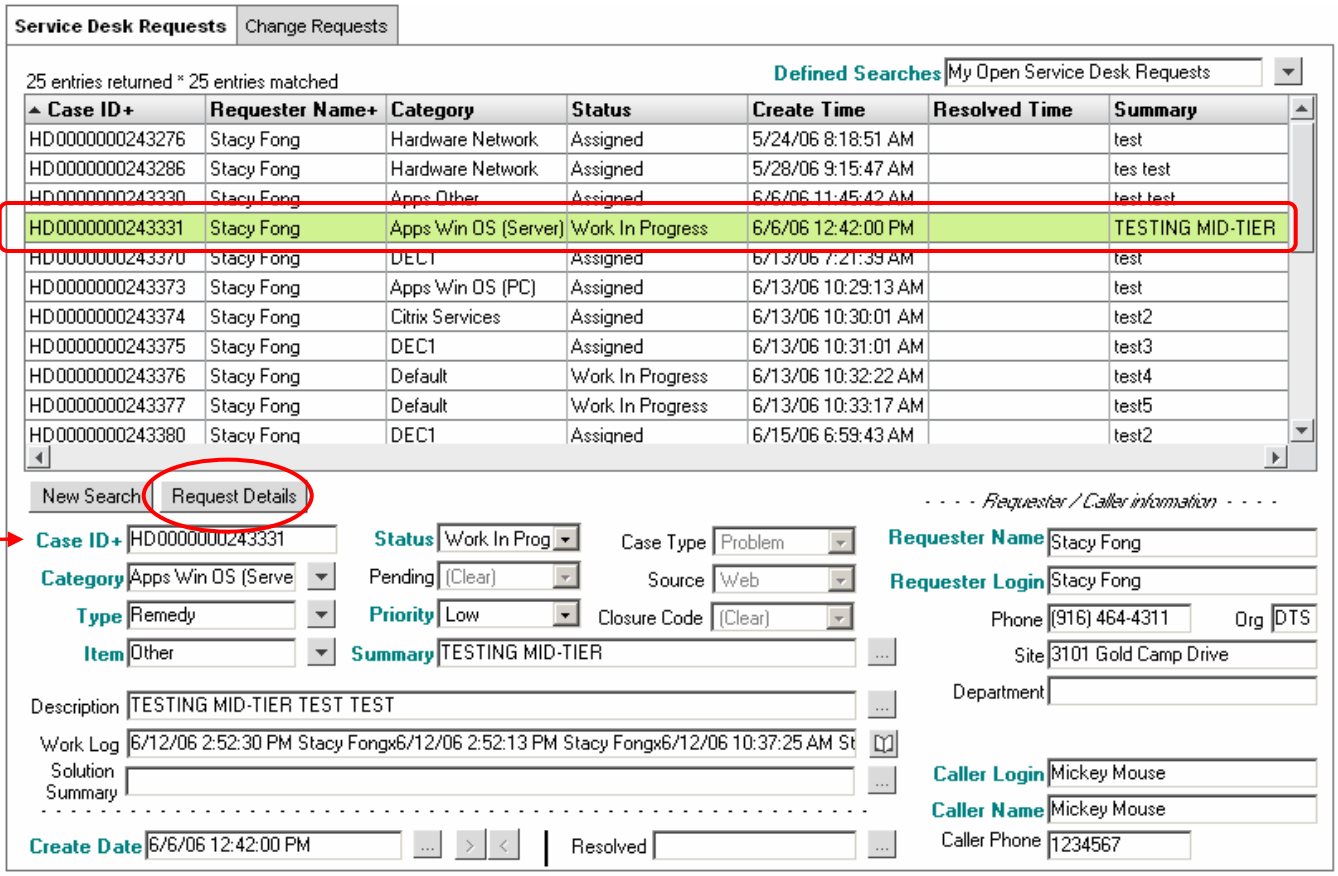
SEARCH OPTIONS – DATE SEARCH FUNCTION (SERVICE DESK REQUEST ONLY)

- If you perform a Date Search function, click on the text editor … located on the right of the field. A calendar will appear allowing you to select a date and time. Click okay and the date and time will be entered in the field. By clicking on the › ‹ , you can search for requests either before or after the date entered.

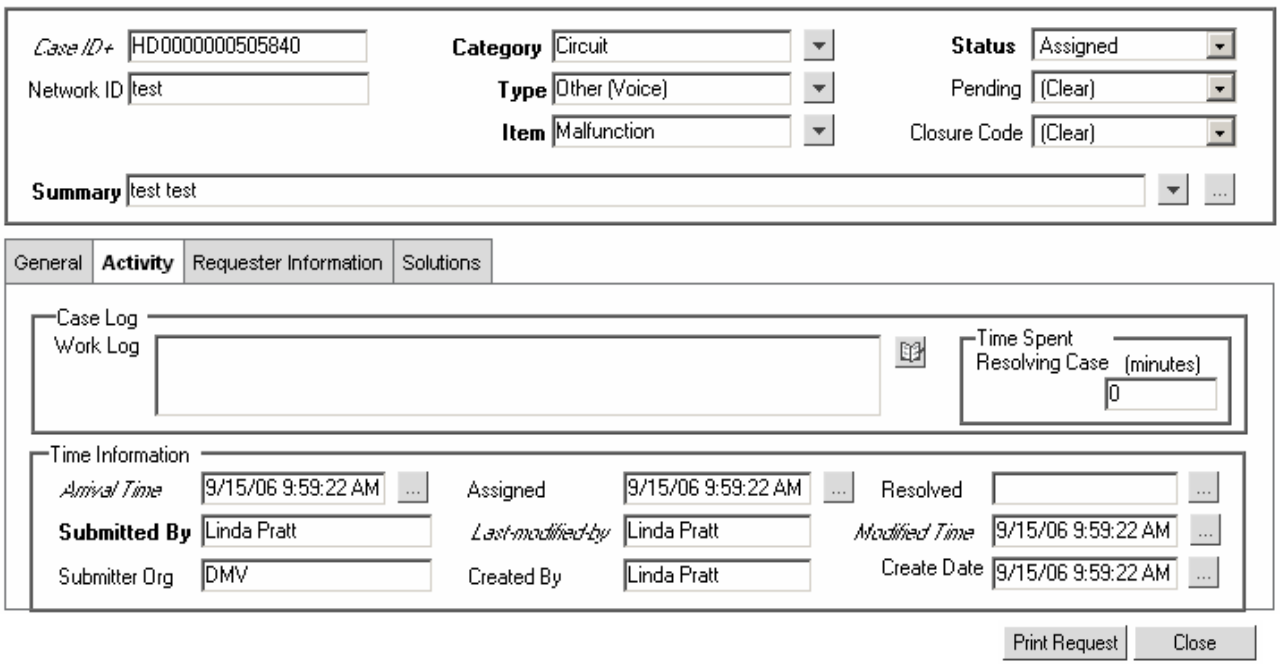


REQUEST DETAILS – PRINTING OUT A REQUEST (EXTERNAL CLIENTS)

- Click on the request you want to print and then click on the Request Details button.

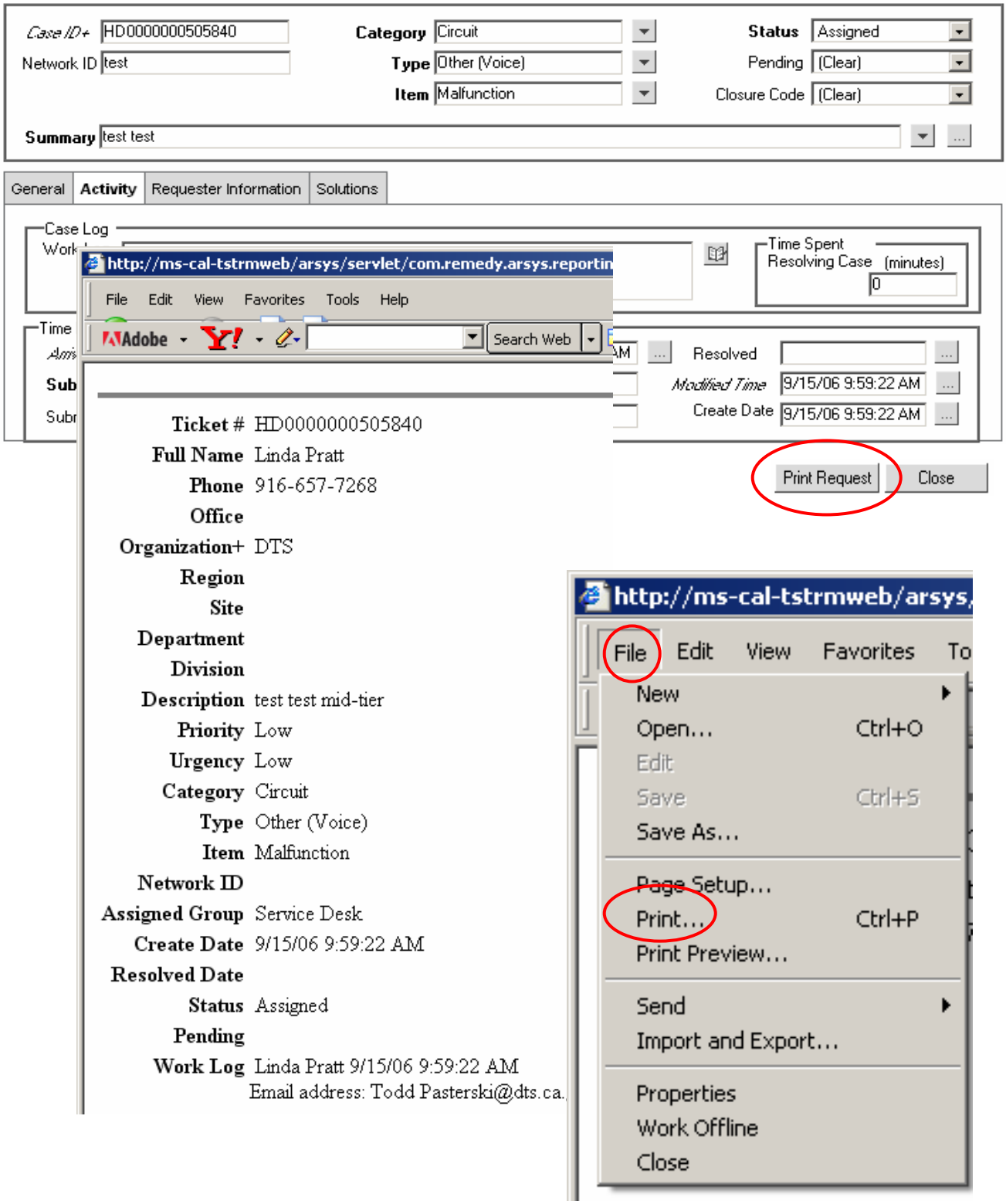


- The following form will be displayed.



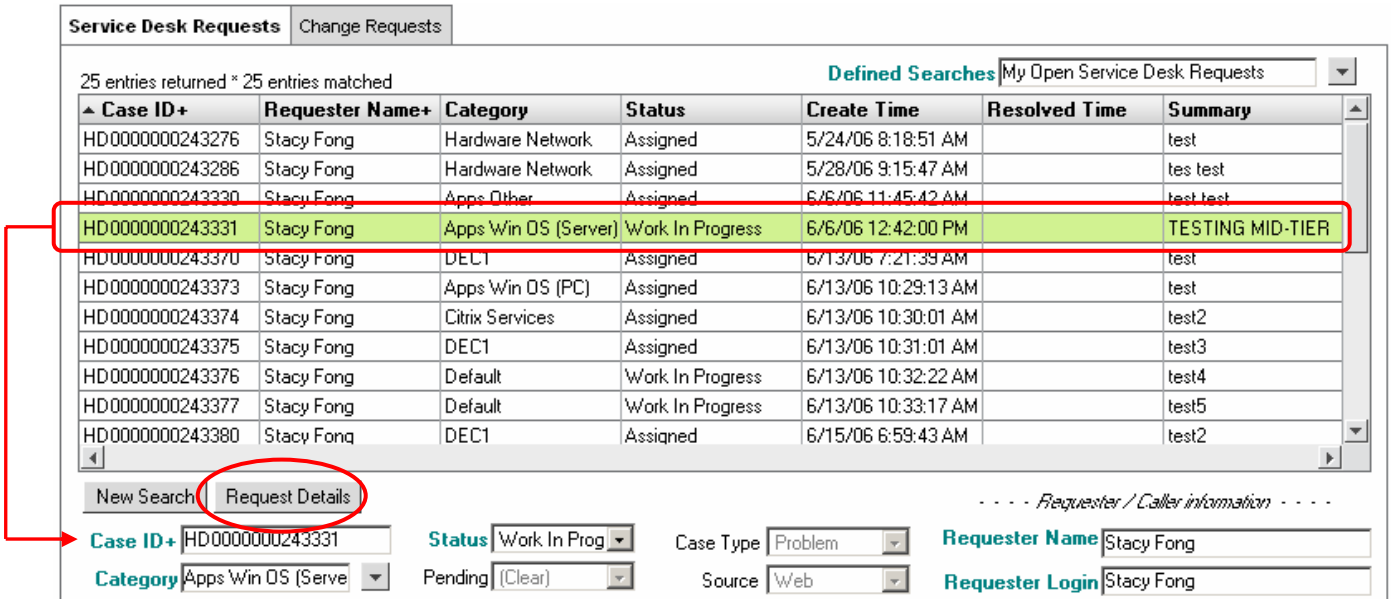
REQUEST DETAILS – PRINTING OUT A REQUEST (EXTERNAL CLIENTS)

- To print a request, click on the Print Request button. This will display the entire request, including entries in the Worklog. Click on File and then Print.

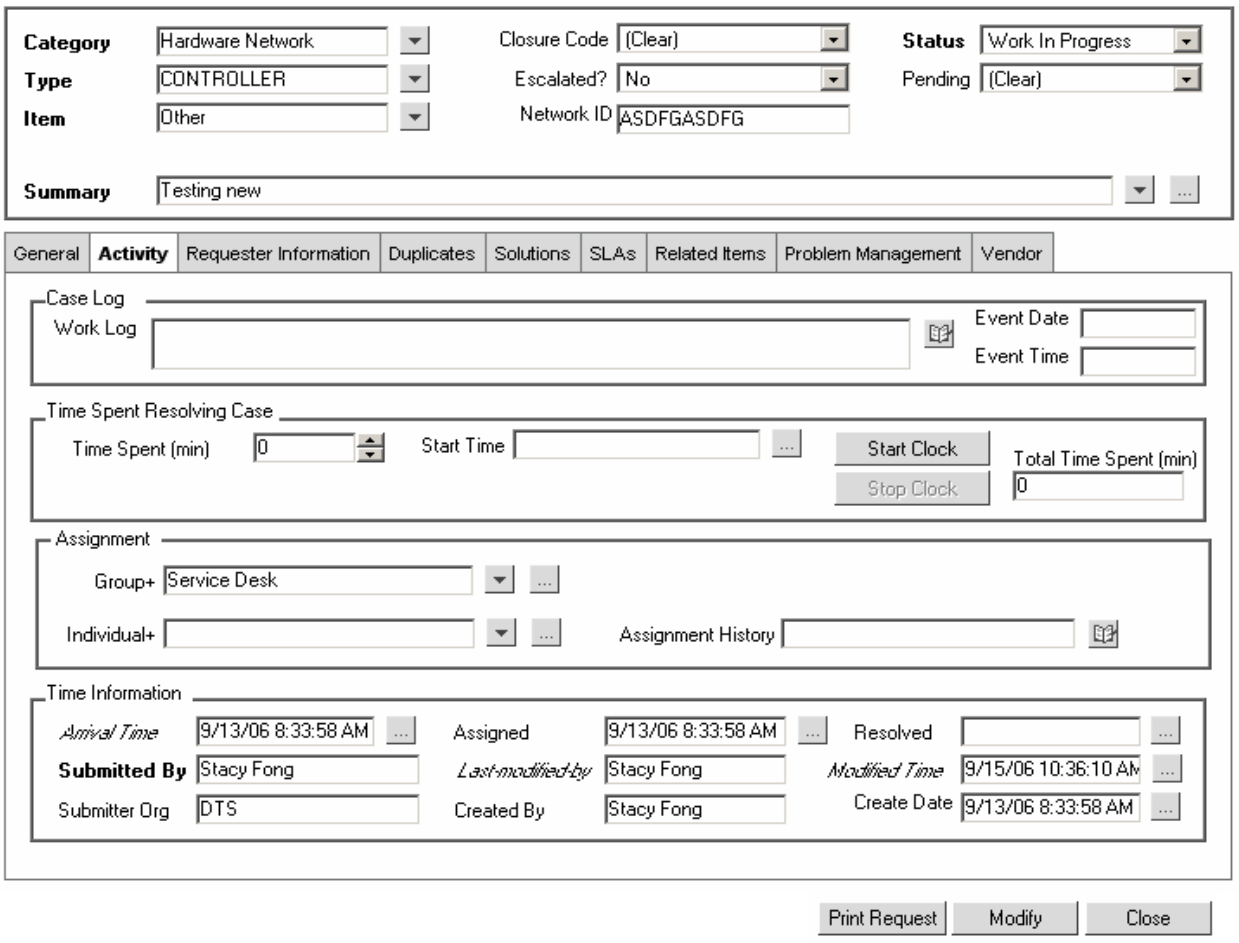


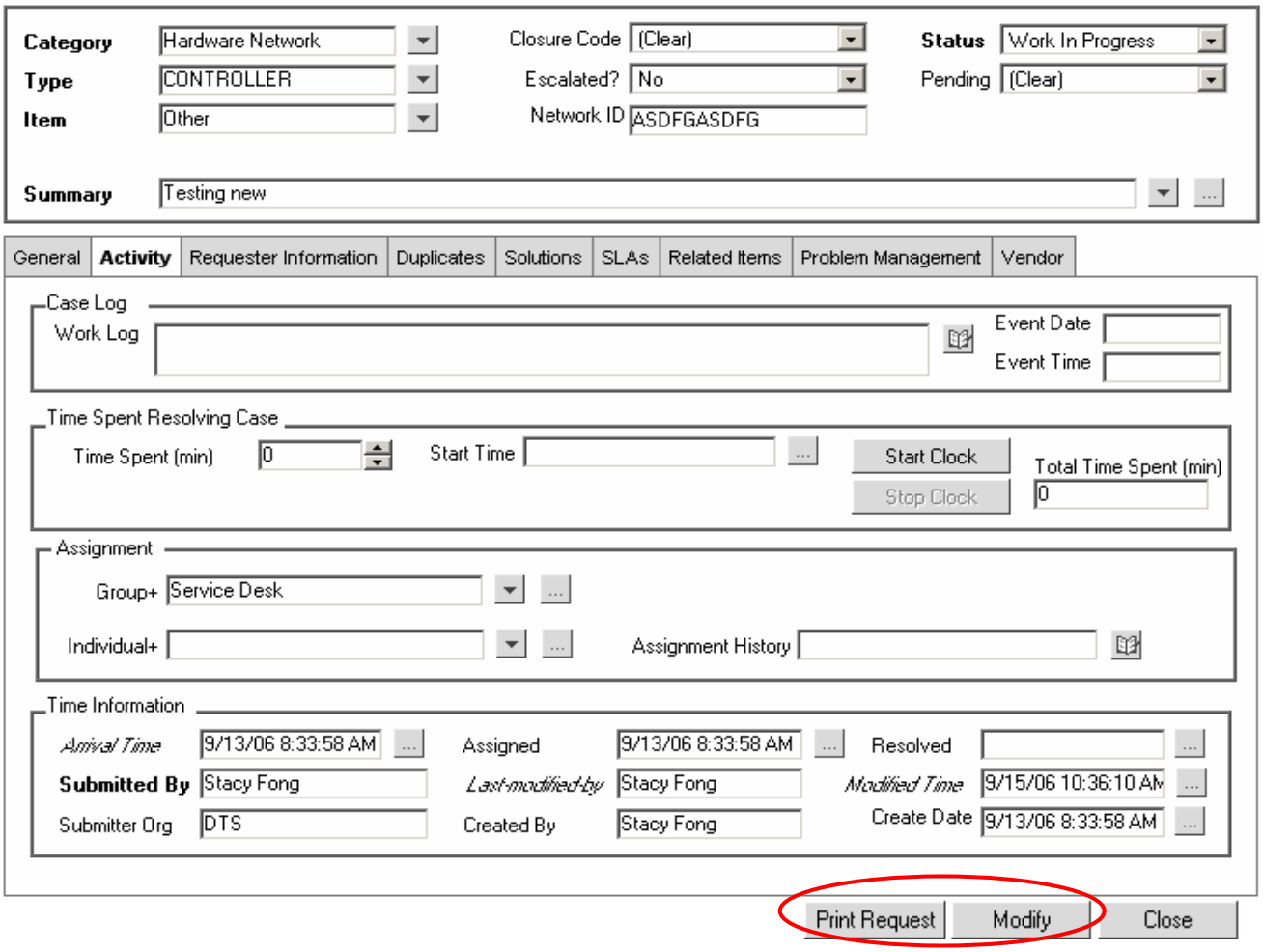
REQUEST DETAILS – MODIFYING / PRINTING (IN-HOUSE DTS STAFF ONLY)

- Click on the request you want to modify or print and then click on the Request Details button.



- The following form will be displayed.



REQUEST DETAILS – MODIFYING / PRINTING (IN-HOUSE DTS STAFF ONLY)

- If you need to update a request.
  - Make the necessary changes to the request.
  - Update the Worklog.
  - Click on the Modify button.
- If you need to print out a request, please follow the print procedure on page 18.